Guide for Electronic Transcript Receipt Management

To help implement the new Electronic Court Reporter Transcript process we have discussed various ways that our partners can best implement a process for receipt of delivery notifications and retrieving the transcripts themselves.

Due to the varying levels of sensitivity, larger organizations will most likely want to implement a multi-tiered approach, whereas a smaller office without a strong base of technical support may find it easier to include all of their attorneys individually. If a smaller office does have a shared mail system then you may want to create a single shared mailbox and use this solely for your transcript notifications.

For larger organizations using a multi-tiered approach, consideration needs to be given to the current practice and also provides an opportunity to reorganize your transcript management process. These examples are given with the assumption that you are on a shared email system either locally hosted or by a third party but with your department insulated either by security policies and/or file structure to allow reasonable assurance that access is limited accordingly. The business process can be accomplished in many different ways and hopefully the following examples can help in deciding which path to take. The Court would prefer to simplify the management of recipients to better reflect the current process where paper transcripts are received by one point of ingress into your office.

Note: each email address submitted creates a unique and separate account with access only to the transcripts submitted to that account. Some limited delegation abilities are available inside that account to provide others access to a specific transcript but is only recommended where one person exclusively manages all transcripts and access to them. In the first or third examples this might be utilized to enable the intake desk to exclusively manage items, but probably not in the second example with a distribution list. **E.g. adding/submitting your <u>individual personal address</u> to a reporter causes only you to have access unless you specifically gave permissions to another account. This could be appropriate for "one off" cases that require special handling (sealed cases, confidentiality issues, etc.), but should be used sparingly if at all due to the extreme access limitation this would create.**

- The easiest implementation would be to exactly mimic the current paper process by using email to accomplish what was done by hand. This process would submit your 'intake desks' email address and notifying the 'intake desk' of an available transcript so they can download it. After download they would either email the document or place it in the intended recipient's network location, usually a personal folder.
  - The downside of using a personal email address is getting the transcript in a timely manner. Delays could occur if the intake desk is unavailable (out at lunch, assigned a different position, sick, or on vacation). Another drawback is identifying the correct network folder due to file clutter and/or lack of notification of the correct folder.

- A department that lacks the available personnel or that only handles sensitive case types exclusively, might consider using a distribution list that would send the email notifications to everyone on the list. This would allow an office to use one repository account, e.g. the distribution address would be the account logon, but notifications would be seen by everyone, which can be helpful if sensitive tasks are shared and no one has to manage another mailbox.
  - Cons would be everyone receiving these emails all the time and they would be mixed into your regular mail unless rules are setup for management.
- The suggested example takes a bit of both the previous ideas to create a new intake desk, by having your IT support create a specific mailbox just for notifications. The mailbox email address being the account for the entire office and the only one used by the court reporter for all the departments' notifications insuring inclusion (e.g. pdtranscripts@co.fresno.ca.us). This mailbox can then be added to relevant email profiles so they can see when notifications come in. This allows you to restrict or expand access to better serve your needs. If you still want to have one person retrieving the transcripts this could be narrowed to the primary and backup personnel's mail profile and they could disseminate as needed. This would allow for better coverage. Providing everyone access in small office environments would not clutter up their mailbox with cases they were not involved in. This example provides the greatest flexibility for implementation and future business process changes.
  - Cons, none that come to mind.